

Session 43



ED Training: Coming Soon to a Desktop near You!

Margaret Day
Mark Gerhard

Agenda

- ☐ Why Distance Education?
- ☐ Live Online Training
- ☐ Self Paced Training
- ☐ Your Feedback Appreciated

Why Distance Education?

Training on my desktop?

**Schools told us they needed more
Training from ED, closer to home and
more convenient to attend.**

We listened

Why Distance Education?

- ☐ Reduces travel costs
- ☐ Reduces time away from the office
- ☐ Flexible scheduling - You can attend any session at time that fits for you
- ☐ Provides Hands-on instruction using ED products with a live ED trainer

Why Distance Education?

- ☐ Free classes
- ☐ Easy to register, change, manage
- ☐ Safe for your computer
- ☐ Won't corrupt your production database
- ☐ Excellent for New Staff Training

Distance Education Available from ED

☐ Two Types

— Live Online Training

- FAA Access
- EDEExpress Pell and Direct Loan processing
- Quality Assurance Software Training
- And More

— Self Paced

- FSA Coach
- EDEExpress Basics
- COD Web Based Training
- And More

Live Online Training

Live Online Training

- ☐ Live training uses:
 - Your computer linked to the Internet
 - Your telephone on a conference call
 - Real Live Trainer

- ☐ All Participants and Trainers are seeing and hearing the same things

Live Online Training

- ☐ Software is now Live Meeting, rather than Webex
- ☐ No more than 15 people in a class
- ☐ Opportunity for attention to your issues

Registering for Live Online Training

1. Open Go to the Schools Portal:
[FSA4Schools/Training/Live Online Training](#)
2. Choose the session that fits your schedule
3. Click on Register
4. Fill in your name, email address, and telephone



U.S. Department of Education Schools Portal

[HOME](#) | [Search](#) | [MY FSA](#) | [Other Links](#) | [Help Center](#) | [Feedback](#) | [Privacy](#) | [IFAP](#)

FSA Links & IFAP Database

Go

Resources & Training

- IFAP Home Page
- Conferences
- Default Management
- FSA Self-Assessments Tool
- ISIR Analysis Tool
- Listserve/Mailing Lists
- Publications and How to Order
- School/Lender/Program Data
- Software and Manuals: SAIG
- Training (TFAP)**
- Videoconferences
- Contacts

FAA Access to Student Data

- CPS (FAFSA/ISIR Processing)
- COD (PELL & DL Processing)
- DL Servicing for FAAs
- NSLDS for FAAs

Participation & Funding

- Application/Recertification (E-App)
- Audits and Program Reviews
- COD on IFAP
- eCampus-Based/FISAP
- Experimental Sites
- eZ-Audit

FSA Calendar

October 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
3	4	5	6	7	1	2
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
Events		Deadlines		Training		NPRMs

Wednesday, October 20

- R2T4 Analyzing Data and Conflicting Information RAC - Bayamon, PR

Sunday, October 17 - Wednesday, October 20

- PASFAA 36th Annual Conference - PA

Sunday, October 17 - Wednesday, October 20

- Rocky Mountain - RMAFSA 2004 Annual Conference - Omaha, NE

Wednesday, October 20 - Friday, October 22

- Kentucky Association KASFAA Fall Conference - Owensboro, KY

Wednesday, October 20 - Friday, October 22

- Washington WFAA Fall Conference - Olympia, WA

Wednesday, October 20 - Friday, October 22

- Arizona Association AASFAA Fall Conference - Laughlin, NV

Wednesday, October 20 - Saturday, October 30

- Notice extending institutional and applicant filing and reporting deadlines.

FSA Headlines

FSA News

- Beta Testers Needed for EDEExpress for Windows 2005-2006, Release 1.0
- Second Phase of the ISIR Analysis Tool Web Application Now Available
- Number of Applications Received by School by Source for 2003-2004 and 2004-2005

[More ...](#)



TRAINING

for Financial Aid Professionals

Training

[Training for New Financial Aid Professionals:](#)

- [FSA COACH](#)
- [Fundamentals of Title IV Administration](#)

[Training on Specific Functions:](#)

- [R2T4, Analyzing Data, and Conflicting Information](#)
- [COD Computer-Based Training](#)
- [Electronic Applications Training](#)
- [EDExpress Basics](#)
- [Live Online Training](#)
- [PLS Web-based Training](#)
- [Cash Management](#)
- [Student Eligibility Basics](#)

Conferences

- [Electronic Access Conferences](#)
- [Orlando](#) Nov. 1-4, 2004
- [Las Vegas](#) Nov. 30 - Dec. 3

[Training Home](#) | [Schools Portal](#) | [Help/Feedback](#) | [Privacy](#)

Welcome to TFAP!

Training for Financial Aid Professionals (T-FAP) replaces the FSA University website; use it to find a complete list of current and future training activities and learning resources provided by the Federal Student Aid programs.

To help you choose training that's tailored to your needs, we've identified the experience level and functional role appropriate for each series. If you're in the first two years on the job (or just want a "refresher"), see our listings for [New Financial Aid Professionals](#). If you need training on a specific financial aid system or in a specialized area of financial aid administration, check out courses in [Training for Specific Functions](#).

Going to training at one of our regional offices? Check our directions and other helpful information for FSA [Regional Training Facilities](#).

... Announcements ...

Coming to a location near you!

Electronic Application Processing Training Spring 2004

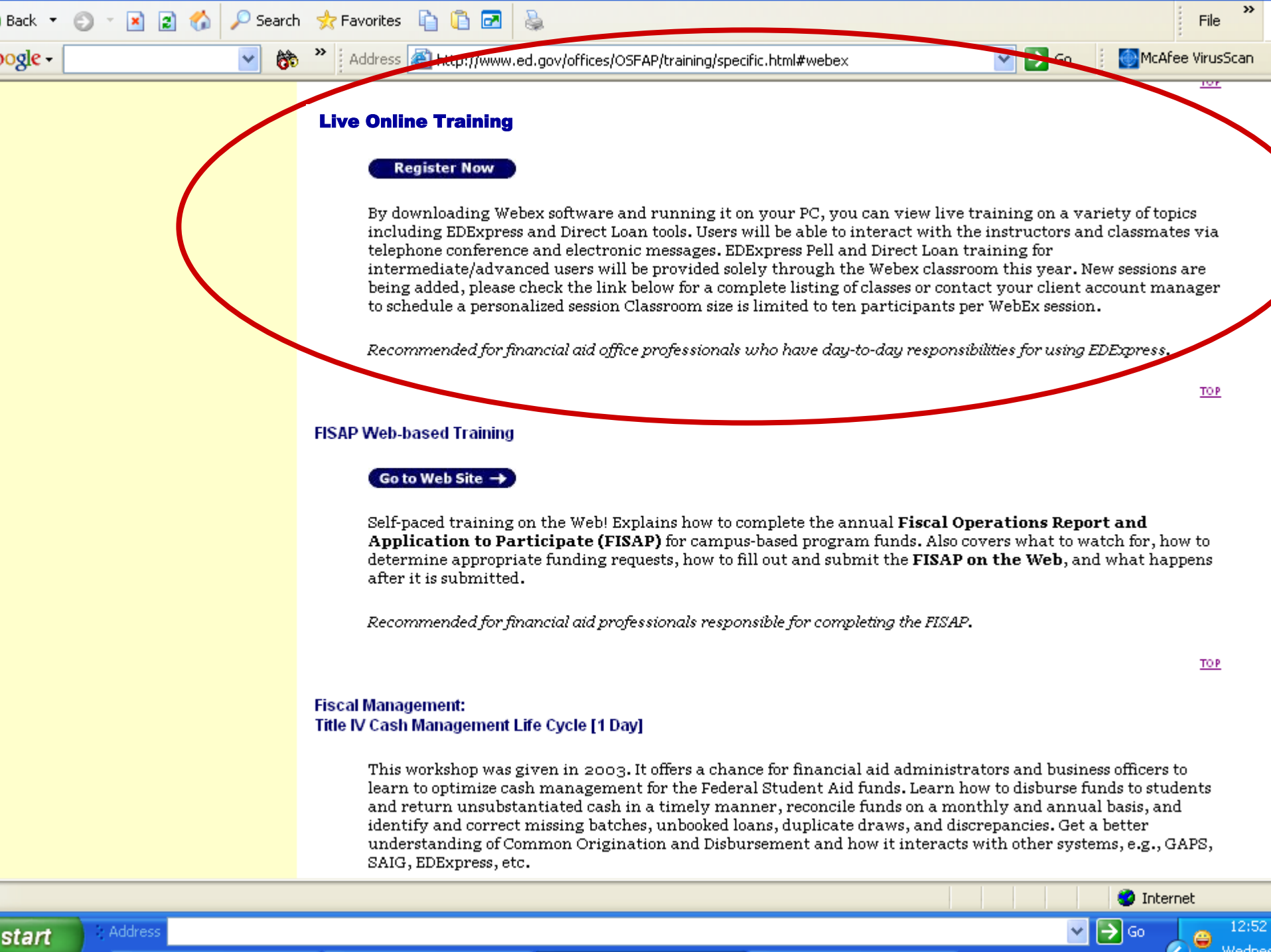
Find out about new tools, functionality, and changes that will help you manage application data at your institution. Electronic Application Processing Training is a one-day course for financial aid staff with day-to-day responsibilities in processing and managing student applications.

Pell Grant and Direct Loans Spring 2004

Training for Pell Grant Processing and Direct Loans for 2004-2005 will be offered exclusively using WebEx technology.

R2T4, Analyzing Data, and Conflicting Information (RAC) Fall 2004

Aimed at experienced financial aid administrators, this one-day training will use a combination of case studies, group exercises, and lecture to present updated information on these key topics.



Live Online Training

[Register Now](#)

By downloading Webex software and running it on your PC, you can view live training on a variety of topics including EDEExpress and Direct Loan tools. Users will be able to interact with the instructors and classmates via telephone conference and electronic messages. EDEExpress Pell and Direct Loan training for intermediate/advanced users will be provided solely through the Webex classroom this year. New sessions are being added, please check the link below for a complete listing of classes or contact your client account manager to schedule a personalized session Classroom size is limited to ten participants per WebEx session.

Recommended for financial aid office professionals who have day-to-day responsibilities for using EDEExpress.

[TOP](#)

FISAP Web-based Training

[Go to Web Site →](#)

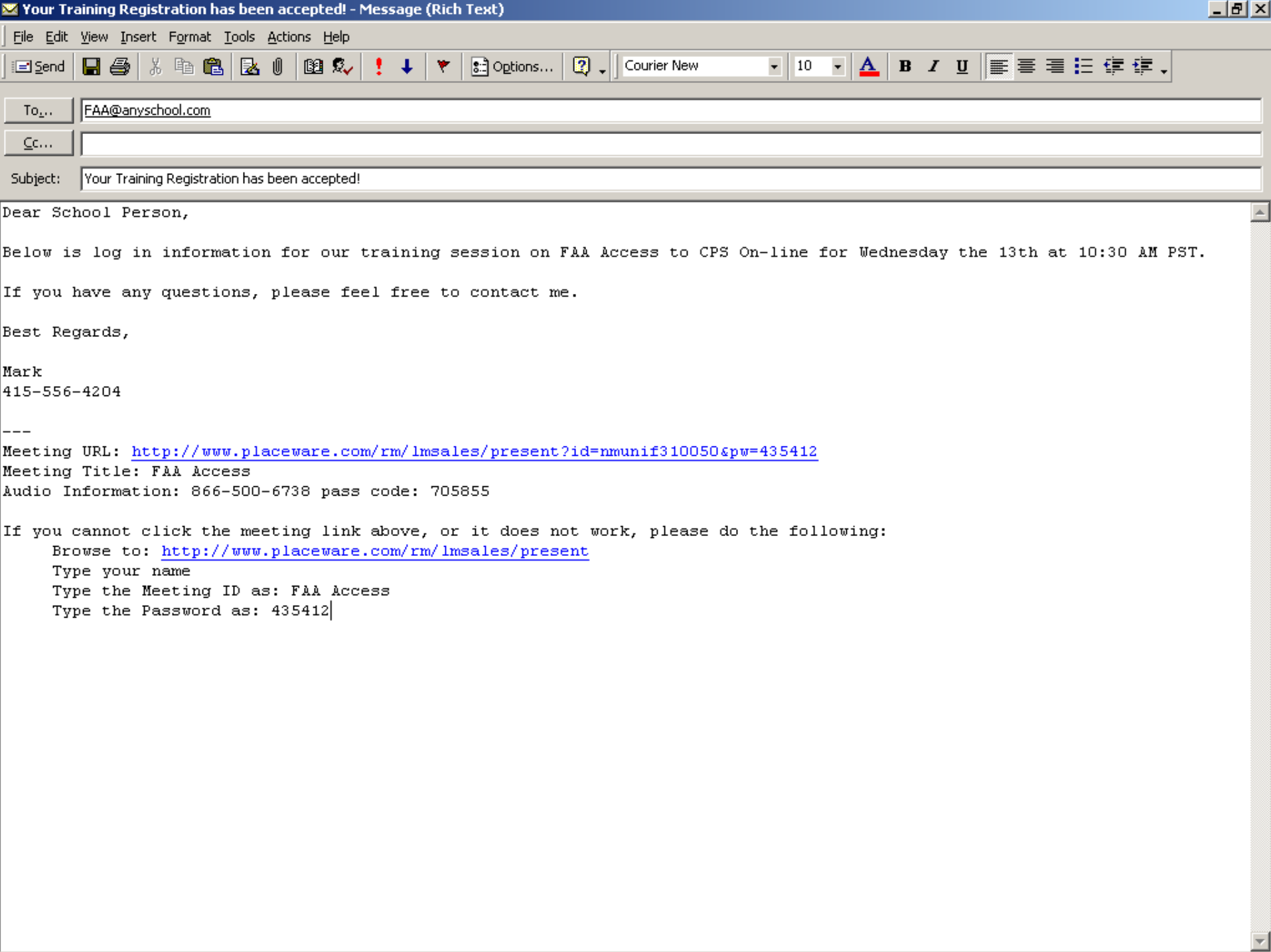
Self-paced training on the Web! Explains how to complete the annual **Fiscal Operations Report and Application to Participate (FISAP)** for campus-based program funds. Also covers what to watch for, how to determine appropriate funding requests, how to fill out and submit the **FISAP on the Web**, and what happens after it is submitted.

Recommended for financial aid professionals responsible for completing the FISAP.

[TOP](#)

Fiscal Management: Title IV Cash Management Life Cycle [1 Day]

This workshop was given in 2003. It offers a chance for financial aid administrators and business officers to learn to optimize cash management for the Federal Student Aid funds. Learn how to disburse funds to students and return unsubstantiated cash in a timely manner, reconcile funds on a monthly and annual basis, and identify and correct missing batches, unbooked loans, duplicate draws, and discrepancies. Get a better understanding of Common Origination and Disbursement and how it interacts with other systems, e.g., GAPS, SAIG, EDEExpress, etc.



No Reminders

- ☐ Live Meeting doesn't send automatic reminders on the day of the meeting.
- ☐ Use your calendar to create an automatic reminder.
- ☐ Cut and paste your invitation into the Appointment box to have all your needed links in one place.

On the Day and Time of Your Session...

- 1. Open the email invitation**
- 2. Click on the first link**
- 3. Enter your name on the Join Meeting page**
- 4. Meeting ID and password are pre-filled**
- 5. Click Submit**

Joining the session

Click the meeting link to attend the meeting.

You have been invited to attend a Microsoft Office Live Meeting

At the time of the meeting, click on the following link to attend.

<http://www.placeware.com/cc/join?id=EMP123&role=attend&pw=H4KC88>

Subject: Employee Training

When: Saturday, Nov 15, 2003 7:00 AM (PST)

Scheduled to Occur: Once

Duration: 1 Hour

Audio Information: 555-0187

Click to add to your Outlook calendar:

<http://www.placeware.com/cc/meetingICS?id=EMP123&role=attend&pw=H4KC88&i=ics>

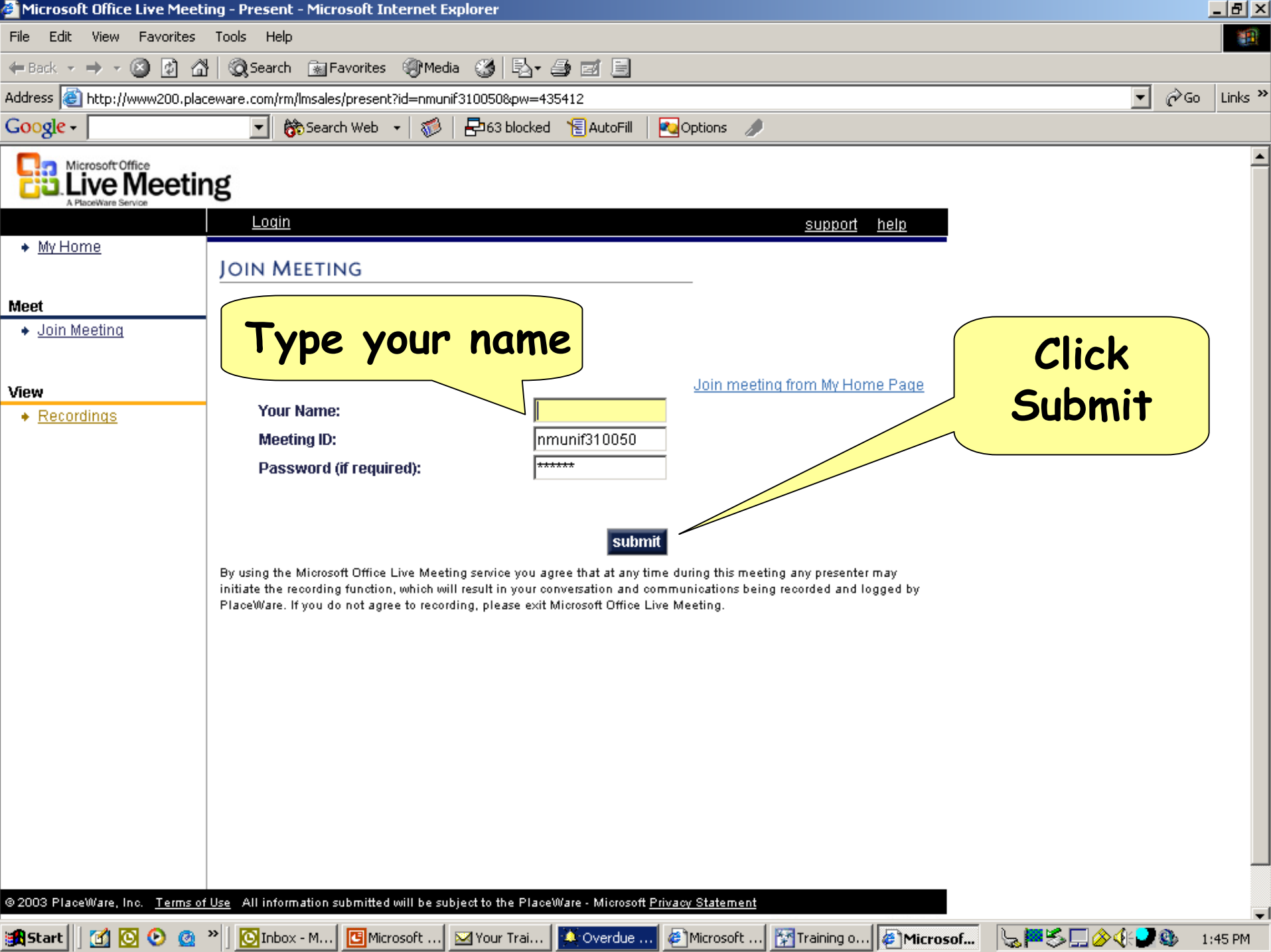
Alternate Attend Instructions:

Go to: <http://www.placeware.com/cc/join>

Your Name: (enter your name)

Meeting ID: EMP123

Meeting Password: H4KC88



Type your name

Click Submit

[Join meeting from My Home Page](#)

Your Name:

Meeting ID:

Password (if required):

nmunif310050

submit

By using the Microsoft Office Live Meeting service you agree that at any time during this meeting any presenter may initiate the recording function, which will result in your conversation and communications being recorded and logged by PlaceWare. If you do not agree to recording, please exit Microsoft Office Live Meeting.

Second option to join

1. If the first link isn't active, use the second or third link from the invitation.
2. Enter the your name and the password/ meeting ID given in the invitation.

Second option to join

If the previous link is not active, enter one of these URLs in your browser address box.

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Alternate Attend Instructions:

Go to: <http://www.placeware.com/cc/join>

Your Name: (enter your name)

Meeting ID: EMP123

Meeting Password: H4KC88

Complete to join

Type your name,
meeting ID, &
password

JOIN MEETING

Your Name:

Meeting ID:

Password (if required):

[Join meeting from My Home Page](#)

First Time Considerations

1. You may be asked to choose a console (format for training environment)

- Windows ActiveX
 - - Console used by some virus builders
 - - Offers wide range of graphic capabilities
- Java
 - - Less likely to be a vehicle for viruses
 - - Offers reduced range of graphic capabilities

First Time Considerations

2. Talk with your technical advisor regarding which console to choose

3. Click Enter Meeting

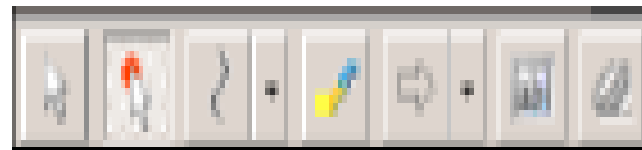


First Time Considerations

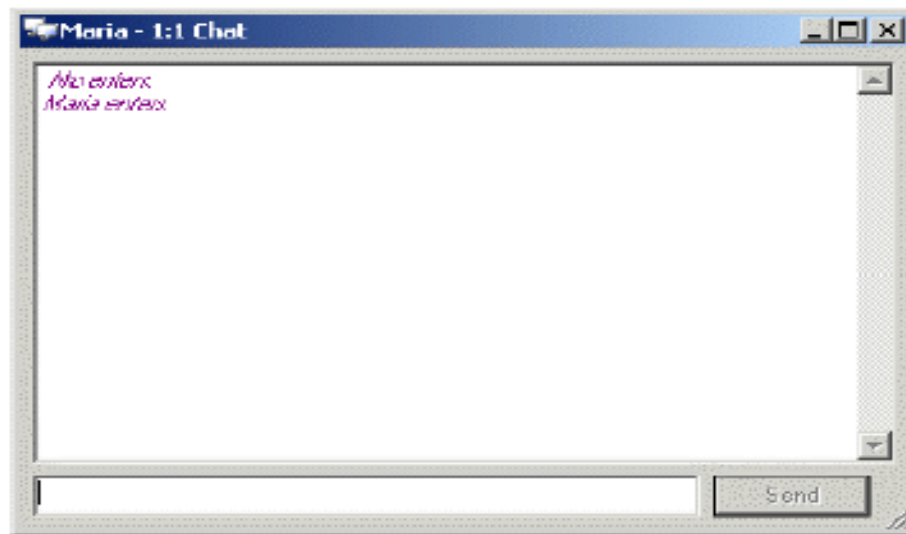
- ☐ If your computer satisfies all readiness requirements, the console choice will not appear.
- ☐ Instead the meeting console immediately appears.

Annotation Features

- ☐ Draw
- ☐ Write
- ☐ Highlight
- ☐ Add arrows
- ☐ Erase
- ☐ Select font colors



Chat box



1. Select receiver
2. Type message
3. Click Send

Self Paced Training

Self Paced Distance Education Products from ED

- ☐ **FISAP Computer Based Training (CBT) -
Fiscal Operations Report and Application
to Participate**
- ☐ **EDExpress Basics CBT – Tutorial of all
basic EDExpress modules (Global,
Application, Pell, Direct Loan, Packaging)**
- ☐ **FSA Coach CBT – Basic Policy training
- Now for Foreign Schools too!**
- ☐ **COD CBT– Hands-on for all functions of
COD**

Fiscal Operations Report and Application to Participate (FISAP)

- ☐ **How to complete the annual FISAP for campus-based funds**
- ☐ **How to determine appropriate funding requests**
- ☐ **How to fill out and submit the FISAP on the Web**
- ☐ **What happens after submission**

FISAP Web-based Training

[Go to Web Site →](#)

Self-paced training on the Web! Explains how to complete the annual **Fiscal Operations Report and Application to Participate (FISAP)** for campus-based program funds. Also covers what to watch for, how to determine appropriate funding requests, how to fill out and submit the **FISAP on the Web**, and what happens after it is submitted.

Recommended for financial aid professionals responsible for completing the FISAP.

Fiscal Management:

Title IV Cash Management Life Cycle [1 Day]

This workshop was given in 2003. It offers a chance for financial aid administrators and business officers to learn to optimize cash management for the Federal Student Aid funds. Learn how to disburse funds to students and return unsubstantiated cash in a timely manner, reconcile funds on a monthly and annual basis, and identify and correct missing batches, unbooked loans, duplicate draws, and discrepancies. Get a better understanding of Common Origination and Disbursement and how it interacts with other systems, e.g., GAPS, SAIG, EDEExpress, etc.

Resource: [The Blue Book](#) (PDF) is a comprehensive guide to accounting, recordkeeping, and reporting procedures in the Federal Student Aid Programs, tailored to the needs of the business office at your school.

[Agenda](#)

Training at FSA Conferences

[Register Now](#)

Hands-on computer training for *FAA Access to CPS* and other specific functions are offered as a part of the Electronic Access Conferences (held in the fall) and the Spring Conference. These conferences also have general and breakout sessions on program requirements and how to use FSA Web sites and software. Go to the Conferences registration Web site for the agenda, schedule of sessions, and other details.



Click Here For



CONQUERING THE FEAR OF FISAP
A Web-Based Tutorial

EDExpress Basics CBT

- ☐ **EDExpress and Edconnect**
- ☐ **Select the module (Global, Application, Pell, Direct Loan, Packaging)**
- ☐ **Hands-on practice in a simulated environment**
- ☐ **Install EDExpress 9.1**
- ☐ **Download additional EDExpress Training software and data files**
- ☐ **508-compliant version available**

[TOP](#)

EExpress Basics Computer-based Training (Downloadable PC software)

[Go to Web Site →](#)

Self-paced training that teaches basic skills required to access and navigate the EExpress and EDconnect software. A beginning user learns the functionality and practices using the software in a simulated environment. This product is strongly recommended before attending EExpress classroom training. Recommended for financial aid office professionals who have day-to-day responsibilities for using EExpress. A 508-compliant version is also available. Users of that product will need to have EExpress 9.1 installed and download additional EExpress Training software and data files.

Recommended for financial aid office professionals who have day-to-day responsibilities for using EExpress.

[TOP](#)

WebEx Training

[Register Now](#)

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EDEExpress Basics Web-based Training



U.S. Department of Education

Welcome to the EDEExpress Basics Web-based Training!

Schools Portal

The [Schools Portal](#) is the gateway to all of the FSA sites a school uses.

FSA's School Delivery Channel is proud to offer you this introduction to the functions of EDEExpress.

Learner ID and Password

The course will ask you for a Learner ID and Password. This login information is for your personal use. The course will track your progress and bookmark the last page you visited when you exited. The next time you enter the course, you will be able to continue from the page bookmarked. When you create your User ID and Password, be aware that this is not a secure site, so you should NOT use an ID and Password that you use on other secure systems. This version is not compatible with screen reader software.

Text Only Version

FSA's School Delivery Channel is also proud to offer a text only version of the EDEExpress Basics Web-based training with interactive software exercises. The text only version is compatible with screen reader software.

Log In

Use the links below to select the appropriate cycle year and course type. If you require the assistance of a screen reader, please use the link to the Text Only Version.

FSA Coach

- ☐ Comprehensive, introductory course on school requirements for administering the Federal Student Aid programs
- ☐ 36 lessons can be completed individually
- ☐ Tailor the training to your specific needs.
- ☐ Strongly recommended as pre-requisite for "Fundamentals of Title IV" training

FSA COACH for Foreign Schools

- ☐ Requirements for administering FFEL loans used by U.S. students at participating foreign schools
- ☐ 2004-2005 award year
- ☐ 23 lessons can be completed individually



File

Google

Address

<http://www.ed.gov/offices/OSFAP/training/newfaps.html#fsacoa>

Go



McAfee VirusScan



TRAINING

for Financial Aid Professionals

Training

Training for New Financial Aid Professionals:

- [FSA COACH](#)
- [Fundamentals of Title IV Administration](#)

Training on Specific Functions:

- [R2T4, Analyzing Data, and Conflicting Information](#)
- [COD Computer-Based Training](#)
- [Electronic Applications Training](#)
- [EDEXpress Basics Computer-Based Training](#)
- [WebEx Training](#)
- [FISAP Web-Based Training](#)
- [Cash Management](#)
- [Student Eligibility Basics](#)

Conferences

- [Electronic Access Conferences](#)
- [Orlando](#) Nov. 1-4, 2004
- [Las Vegas](#) Nov. 30 - Dec. 3

[Training Home](#) | [Search](#)

Both US & Foreign Schools

Training for New Financial Aid Professionals

FSA COACH Web-based Training

[Go to Web Site →](#)

A comprehensive, introductory course on school requirements for administering the Federal Student Aid programs. The 36 lessons can be completed individually, allowing you to tailor the training to your specific needs.

Strongly recommended as a pre-requisite for the "Fundamentals of Title IV" training below.

FSA COACH for Foreign Schools Web-based Training

[Go to Web Site →](#)

This edition of FSA COACH for the 2004-2005 award year contains 23 lessons describing requirements for administering FFEL loans used by U.S. students at participating foreign schools.

Fundamentals of Title IV Administration [4.5 days]

[View Dates/Sites](#)
[✓ Register Now!](#)

Required for all CEO/President and financial aid administrators of schools seeking or awaiting initial certification; strongly recommended for new or inexperienced aid professionals who need to learn the basics of Federal Student Aid. All postsecondary schools that are new to the Title IV programs or are awaiting certification must send one CEO/President or designee to the training for the first two days and one financial aid administrator (FAA) for the entire four and one-half days.

A basic but comprehensive course that touches on all aspects of administering the Federal Student Aid programs, including: laws and regulations, administrative and financial systems, application processing,



FSA COACH

Welcome to FSA COACH 2004-2005

2004-2005

ENTER

Welcome to FSA COACH for Foreign Schools 2004-2005



FSA COACH for Foreign Schools 2004-2005

ENTER

Common Origination and Disbursement CBT

- **Eight sessions**
- **Simulates COD web screens and functions**
- **Provides practice creating/ retrieving info**
- **Feedback to help the learner**
- **Fictitious data for over 600 persons/ 20 schools**
- **Recommended for business officers and Pell or Direct Loan Managers**

[Skip Nav](#)

U.S. Department of Education

Information for Financial Aid Professionals (IFAP) Library

U.S. Department of Education, Information for Financial Aid Professional (IFAP) Library

[Help Center](#) | [What's New](#) | [Schools Portal](#) | [Other Links](#) | [Feedback](#) | [Privacy](#)

The IFAP online library contains technical publications, regulations, and policy guidance on the administration of the Federal Student Aid programs.

SEARCH

Keyword Search:

- [Advanced Search](#)
- [About this Search](#)

OTHER VIEWS

- [Current Publications](#)
- [Archived Publications](#)
- [Publications by Topic](#)

SCHOOL PORTAL FEATURES

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- [FSA Calendar](#)
- [FSA Conferences and](#)

Tools for Schools

- [Aids to Promoting Federal Aid](#)
- [COD \(computer based training\)](#)
- [Conference Presentations](#)
- [EDEXpress Basics \(CBT\)](#)
- [eZ-Audit](#)
- [FISAP Web Based Training](#)
- [FSA Assessments](#)
- [FSA COACH \(computer based training\)](#)
- [ISIR Analysis Tool](#)
- [Listserve/Mailing Lists](#)
- [Videoconferences](#)

Letters & Bulletins

Dear Partner/Colleague Letters

- [Campus-based \(CB\)](#)
- [Financial Partners \(FP\)](#)
- [General Distribution \(GEN\) Letters](#)
- [Pell Grant \(P\)](#)
- [Training & Development \(T&D\)](#)

On-Line References

- [Accrediting Agencies: List and Criteria for Recognition](#)
- [Application Processing Materials](#)
- [Campus-Based Program Materials](#)
- [Common Origination & Disbursement \(COD\)](#)
- [Default Rate Materials](#)
- [FFEL Special Allowance Rates & Variable Interest Rates](#)
- [FWS/Community Service Resource Guide](#)
- [NSLDS Reference Materials](#)
- [Pell Grant \(RFMS\) Program Materials](#)
- [Program Review Guidance](#)
- [SAR/ISIR Reference Materials](#)

Law & Regulations

- [Code of Federal Regulations \(GPO Compilation\)](#)
- [Federal Registers](#)
- [Higher Education Act \(thru October 2002\)](#)
- [HEA Amendments](#)



[Electronic Access Conferences](#)
[Vegas](#) Nov. 1-4, 2004
[Vegas](#) Nov. 30 - Dec. 3

COD Computer-Based Training (Downloadable PC software)

Download Now ↓

Self-paced training in eight sessions that will guide you through each area of the COD system. It simulates the COD web screens and functions. Explores the basic navigation and functions of the COD website and provides practice creating and retrieving information with feedback to help the learner. The program uses fictitious data for over 600 persons and 20 schools that offer a wide range of scenarios.

The program requires a Windows 98 or higher operating system with an ODBC driver for Microsoft Access 2000. Your screen resolution should be set to 1024 x 768 or higher.

Recommended for business officers and those who work with the Pell or Direct Loan Programs.

[TOP](#)

Electronic Applications Training

The Electronic Applications training is a classroom-based, instructor-led, hands-on course covering the following subjects:

1. FAA Access on the Web, including accessing, making corrections and verification data processing
2. ISIR Datamart, access, reporting, queries and best practices
3. Business process improvement, how you can take advantage of the new electronic products
4. Changes to EDEXpress

NOTE: This is not an EDEXpress specific course. We strongly encourage ALL school staff with responsibility for entering student eligibility data to attend this course. The course is intended for intermediate to advanced users of all the Department's electronic products. Users should be familiar with the Title IV regulations governing the awarding and disbursement of Student Aid. We encourage all students to visit our Web Based EDEXpress Basics course to ensure they are prepared for the classroom training.

[TOP](#)

EDEXpress Basics Computer-based Training (Downloadable PC software)

Go to Web Site →

Self-paced training that teaches basic skills required to access and navigate the EDEXpress and EDconnect software. A beginning user learns the functionality and practices using the software in a simulated

Author: General Manager| School Delivery Channel| FSA ASEDS

Summary: Updated Computer-Based Training Program for COD System Web Site

Posted on 04-08-2004

TO: All Destination Points

FROM: General Manager, School Delivery Channel, FSA ASEDS

SUMMARY: Updated Computer-Based Training Program for COD System Web Site

We are pleased to announce the availability of the updated computer-based training (CBT) program for the Common Origination and Disbursement (COD) System web site, www.cod.ed.gov. The updated COD CBT program includes enhancements that have been made to the COD System from September 2003 through March 2004. The electronic files for the COD CBT program are attached to this announcement.

The COD CBT program requires a Windows 98 or higher operating system that contains an ODBC driver for Microsoft Access 2000 in order to run properly. The screen resolution should be set to 1024 x 768 or higher for optimum viewing. A complete description of the system requirements for the COD CBT program is included in the attached instruction guide.

The COD CBT program simulates the COD System web screens and functionality available to a School Administrator. In the updated COD CBT program, there are eight lessons with text to guide you through each area of the COD System. You can explore basic navigation and functions of the COD web site and practice locating and creating information in a safe environment with tips to assist you. The COD CBT program uses fictitious data for over six hundred (600) persons and twenty (20) schools that offer a wide range of conditions you may experience at your institution.

If you have any questions about the COD CBT program, contact the COD School Relations Center at 800/848-0978 for Direct Loan or 800/4PGRANT for Pell Grant. You may also email CODSupport@acs-inc.com. Please include "COD CBT Comments" in the subject line.

Attachments/Enclosures:

[Instructions for Using the COD Web Simulation Training Program in Microsoft Word Format, 54KB, 3 Pages](#)

[Instructions for Downloading COD Web Simulation Computer-Based Training Program in Microsoft Word Format, 33KB, 2 Pages](#)

[CBT in Executable Zipped Format, Size 5.34MB](#)

Welcome

to the COD system simulation training program.

This program will lead you through the process of using the COD web site to locate, create, and update records for Pell grants and Direct loans. The simulation contains sample data for over six hundred students and twenty schools. All data is fictitious and created to show a wide range of student conditions and school levels.

The program is divided into lessons that walk you through performing tasks in the COD system. Follow the lesson text which will be displayed at the top of the window. After each lesson there is a practice section where you may test your skill in performing these functions. The Open Format section allows you to explore the system as a School Administrator of a full participant school.

The simulation date is March 15, 2004.

Click on the Menu button to begin. If the Menu button is not visible, exit the program and set the Display Settings on your computer to 1024 x 768.

Your Feedback Appreciated

We appreciate your feedback and comments. We can be reached at:

☐ Mark Gerhard
Mark.gerhard@ed.gov

☐ Margaret Day
Margaret.day@ed.gov